

Task Instructions

Task ID: 560

Task Name: *Submit Change Analysis Tool*

Task Start Date: *December 9, 2024*

Task Due Date: *January 31, 2025*

Project Impact: *N/A*

Task Description

Complete and submit the Change Analysis Tool to document your agency's change impacts to your people, processes, technology and data at implementation.

Task Overview

Florida PALM is a business transformation that will change how you do business. Agencies must identify and prepare for changes across the four critical operational elements: people, processes, technology and data.

You have previously completed a series of Current State Analysis RW tasks to understand and document current business practices. You have also built understanding of Florida PALM design and functionality through the design segments and information shared through workshops and published to the Knowledge Center. You have completed and are continuing to work on RW tasks that have supported your understanding of the change impacts for your agency, for example:

- **People Changes** – You have identified and are updating your agency Subject Matter Experts and future Florida PALM end users (RW Tasks 512 and 564).
- **Process Changes** – You have documented changes to your current state business processes after each design segment and selection of spreadsheet uploads to support your processes (RW Tasks 515, 527, and 543).
- **Technology Changes** – You have selected and are confirming Florida PALM interfaces (RW Tasks 505, 518, 530, 546, and 557).
- **Data Changes** – You are confirming and providing any needed updates to agency-specific configurations (RW Tasks 513, 541, and 567).

The purpose of this task (RW 560) is to complete the Change Analysis Tool which will allow you to consolidate, review and update or confirm your identified change impacts. The Change Analysis Tool will also allow you to pull much of the work you have completed across multiple worksheets (e.g., Current State Business Process Inventory, FLAIR Data Elements Inventory, Florida PALM Interfaces Inventory) into one combined tool.

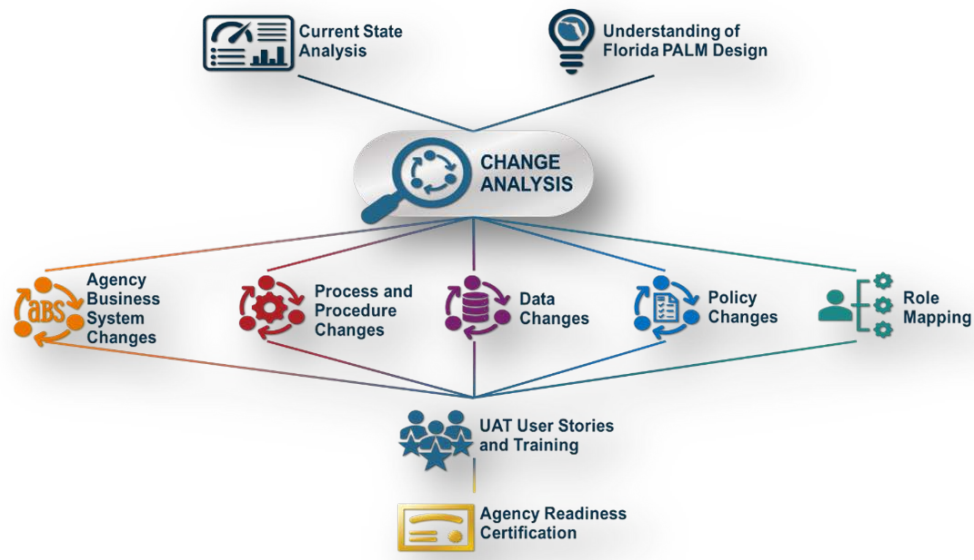


Figure 1: Agency Change Analysis

Figure 1 above depicts how the Change Analysis Tool is the bridge between the work you have completed through Current State Analysis and Understanding of Florida PALM to the documentation of your people, processes, technology, and data changes. By completing the Change Analysis Tool, you will develop an inventory of all activities in Florida PALM that your agency will need to test and validate during User Acceptance Testing (UAT). This inventory will also be a tool to support your identification of training needs for your agency. The ultimate goal of the Change Analysis Tool is to guide your agency through tasks needed to achieve [Agency Readiness Certification](#) for go-live.

Task Elements

This task provides for you to:

1. Review the Florida PALM Topics and Activities list
2. Complete the Change Analysis Worksheet for each Business Process Grouping (BPG)
3. Complete Data Mapping Analysis Worksheet (Optional)

To complete this task, a new folder titled *Change Analysis* has been added in your <Agency> Florida PALM Workbook. The *Change Analysis* folder contains the following worksheets:

- <Agency> Change Analysis - <BPG> Processes Worksheet (13 worksheets, 1 for each BPG)
- Combined Change Analysis View Report
- <Agency> Data Mapping Analysis Worksheet

Review the Florida PALM Topics and Activities List

The Florida PALM Topics and Activities list provides a comprehensive listing of the activities that can be completed in Florida PALM and related information (e.g., related Florida PALM module, related business process model, related end user roles, related RICEFW) for each activity. This

Florida PALM Topics and Activities list will serve as the foundation for your Change Analysis tool. Every applicable “agency” activity in the Florida PALM Topics and Activities list will appear in your Change Analysis Tool, where you will be responsible for confirming each activity that is applicable to your agency.

Complete the Change Analysis Worksheets for each BPG

Change Analysis worksheets have been created for each BPG. The worksheets are located in your <Agency> Florida PALM Workbook, Change Analysis folder.

Worksheet Field Details

Agencies must provide the following items within each <Agency> Change Analysis - <BPG> Processes.

Table 1: Change Analysis Worksheet Field Details

Field Name	Field Description	Agency Input Required or Optional Field	Source of Data
Activity	List of activities related to this Business Process Grouping	Required	Florida PALM Topics and Activities list <i>A full listing of activities is pre-populated in each worksheet. If you need to duplicate the activity, you may add a new row and select that activity from the drop-down list.</i>
Do You or Will You Perform this Activity?	“Yes” or “No”	Required	N/A
Activity Outside of Florida PALM	Provide title of related activity outside of Florida PALM	Optional	N/A
Topic	The umbrella topic related to the activity	N/A (auto-populated field)	Florida PALM Topics and Activities list <i>The related topic will auto-populate based on the activity selection in the first column.</i>
Related Florida PALM Business Process/ Subprocess	Florida PALM business processes and subprocesses related to the activity	N/A (auto-populated field)	Florida PALM Topics and Activities list <i>The related Florida PALM Business Process/Subprocess will auto-populate based on the activity selection in the first column.</i>
Current-State Business Processes	List of business processes identified in your <Agency> Current-State	Required if ‘Yes’ is selected in the “Do You Perform This	Automated overnight process from <Agency> Current-State Business Processes worksheet.

Field Name	Field Description	Agency Input Required or Optional Field	Source of Data
	<i>Business Processes</i> worksheet	Activity” column – Agency Indicated	If a business process is missing, add the correction in the <Agency> <i>Current-State Business Processes</i> worksheet. Updates will appear next business day.
Current-State Business Subprocesses	List of business subprocesses identified in your <Agency> <i>Current-State Business Processes</i> worksheet	Required if ‘Yes’ is selected in the “Do You Perform This Activity” column – Agency Indicated	Automated overnight process from <Agency> <i>Current-State Business Processes</i> worksheet. If a business subprocess is missing, add the correction in the <Agency> <i>Current-State Business Processes</i> worksheet. Updates will appear next business day.
Division, Office, Bureau, or Unit	List of divisions, offices, bureaus, and units identified in your <Agency> <i>Implementation End Users</i> worksheet	Required if ‘Yes’ is selected in the “Do You Perform This Activity” column – Agency Indicated	Automated overnight process from <Agency> <i>Implementation End Users</i> worksheet. If a selection is missing, make the update in the <Agency> <i>Implementation End Users</i> worksheet. Updates will appear next business day.
Types of Changes	List of the type of changes relating to the activity from current-state to Florida PALM Drop down options include: <ul style="list-style-type: none"> • Documentation Change • End User Change • Policy Change • Procedure Change • System Change • N/A 	Required if ‘Yes’ is selected in the “Do You Perform This Activity” column – Agency Indicated	N/A
Describe the Process Change	Summarize the process changes occurring	Required if ‘Yes’ is selected in the “Do You Perform This Activity” column	N/A

Field Name	Field Description	Agency Input Required or Optional Field	Source of Data
		– Agency Provided	
Related End User Role(s)	List of End User role(s) based on the Activity	N/A (auto-populated field)	Florida PALM Topics and Activities list <i>The related end user roles will auto-populate based on the activity selection in the first column.</i>
Describe the People Change	Summarize the people changes occurring	Required – Agency Provided	N/A
Related Florida PALM Spreadsheet Upload(s)	List of Florida PALM spreadsheet uploads from your <Agency> <i>Current-State Business Processes</i> worksheet	Required – Agency Indicated	Automated overnight process from <Agency> <i>Current-State Business Processes</i> worksheet. If a Florida PALM Spreadsheet Upload is missing, add the correction in the <Agency> <i>Current-State Business Processes</i> worksheet. Updates will appear next business day.
Related Florida PALM Report(s)	List of Florida PALM reports related to the BPG	Required if ‘Yes’ is selected in the “Do You Perform This Activity” column – Agency Indicated	Florida PALM Topics and Activities list
Describe the Data Change	Summarize the data changes occurring	Required if ‘Yes’ is selected in the “Do You Perform This Activity” column – Agency Provided	N/A
Related Agency Business Systems	List of agency business systems from your <Agency> <i>Current-State Business Systems</i> worksheet	Required if ‘Yes’ is selected in the “Do You Perform This Activity” column – Agency Indicated	Automated overnight process from <Agency> <i>Current-State Business Systems</i> worksheet. If an agency business system is missing, add the correction in the <Agency> <i>Current-State Business Systems</i> worksheet. Updates will appear next business day.

Field Name	Field Description	Agency Input Required or Optional Field	Source of Data
Related Florida PALM Interfaces	List of interfaces from your <Agency Implementation Interfaces and Documentation worksheet	Required if 'Yes' is selected in the "Do You Perform This Activity" column – Agency Indicated	Automated overnight process from <Agency> Implementation Interfaces and Documentation worksheet. If an interface is missing, add the correction in the <Agency> Implementation Interfaces and Documentation worksheet. Updates will appear next business day.
Describe the Technology Change	Summarize the technology changes occurring	Required if 'Yes' is selected in the "Do You Perform This Activity" column – Agency Provided	N/A
Comments	Agency Comments	Optional	N/A

Worksheet Instructions

The information below provides detailed column instructions on how to complete the <Agency> Change Analysis - <BPG> Processes worksheet in Smartsheet.

Task Completion Requirement: For this task (RW Task 560) to be considered complete, it is necessary that you follow all the steps listed below to ensure you have filled in and selected the appropriate values.

Identify the Activities Your Agency Performs

1. Review the list of activities related to the business process grouping in the *Activity* column. Identify whether or not your agency performs or will perform each activity for that BPG. In the *Do You or Will You Perform this Activity?* column, select "Yes" or "No" on whether or not your agency performs or will perform that activity.
 - a. If "Yes" is selected, you must provide all the required information for that activity by completing all required columns.
 - b. If "No" is selected, no additional information is required for that activity.
2. If you have a related activity that occurs outside of the Florida PALM system, provide the title of the related activity in the *Activity Outside of Florida PALM (Optional)* column. These related activities often occur before or after the Florida PALM Activity. Examples include activities that occur in an Enterprise System or Agency Business System or manual processes such as printing and distributing paper reports.
3. If you have the need to list the same Activity on multiple rows because your agency completes the same activity in a variety of ways (e.g., differences across divisions), you may duplicate the activity row to provide the variations of that activity within your agency.

Map the Current State to the Future State

4. Select the related current-state business process(es) and business subprocess(es) for each Activity that your agency performs in the *Current-State Business Processes* and *Current-State Business Subprocess* columns. If the Activity is not completed in any of the current state business processes or subprocess, select N/A.
 - a. If a current state business process or subprocess is missing from the drop-down list, add the correction in the <Agency> *Current-State Business Processes* worksheet in the *Business Process* and/or *Business Subprocess* column(s). The current state business process or subprocess will appear the next business day.
5. Identify the entity within your agency where the activity is performed in the *Division, Office, Bureau, or Unit* column.
 - a. If a Division, Office, Bureau, or Unit is missing, make the update in the <Agency> *Implementation End Users* worksheet. The Division, Office, Bureau, or Unit will appear next business day.

Document the Changes

6. Select the type(s) of change that will be occurring in the *Types of Changes* column. You can also add a type of change not listed. Drop down options in the multi-select listing include:
 - a. Documentation Change
 - b. End User Change
 - c. Policy Change
 - d. Procedure Change
 - e. System Change
 - f. N/A
7. Provide a summary of the process changes that will need to occur in the *Describe the Process Change* column for the Activity.
 - a. A process is the sequence of procedures to accomplish a business objective.
 - i. Will it be the flow of information or activity sequence, the supporting tools (e.g., forms or procedure manuals) that is impacted? Then note the impact for Processes.
 - ii. Examples include approval of transactions, the content and use of paper or electronic forms, or the production of reports (not the information, but the process of creating the report itself). These would be functions that are established and managed within the agency in support of the future statewide business process.
8. Provide a summary of the people changes that will need to occur in the *Describe the People Change* column for the Activity.
 - a. The people are the staff and stakeholders affected by your agency's transition to Florida PALM.
 - i. Will it be individuals that are impacted? Then note the impact for People.
 - ii. Examples include staff that complete or support the completion of a process, users of the information or resulting process, and external parties that rely on the information. You should identify if you need to include other staff to support the future statewide business process, beyond those existing staff that currently support the business process.
9. Select the related Florida PALM Spreadsheet Upload(s) that will be used with the Activity in the *Related Florida PALM Spreadsheet Upload(s)* column.
 - a. Select N/A if no Florida PALM Spreadsheet Uploads will be used.

- b. If a Florida PALM Spreadsheet Upload is missing, add the correction in the <Agency> Current-State Business Processes worksheet. The newly added Florida PALM Spreadsheet Uploads will appear next business day.
10. Select the related Florida PALM reports your agency will need to use with the Activity in the *Related Florida PALM Report(s)* column. This will help your agency identify which reports will need to be tested prior to Florida PALM go-live.
11. Provide a summary of the data changes that will occur or that the agency will need to adopt in the *Describe the Data Change* column for the activity.
 - a. Data refers to information used in or produced from an agency's financial business operations.
 - i. Will it be the input or output received that is impacted? Then note the impact for Data.
 - ii. Examples include information that is input to or produced from a transaction or business process.
12. Select the related agency business systems that will be used with the activity in the *Related Agency Business Systems* column. Select N/A if the activity does not use any related agency business systems.
 - a. If an agency business system is missing, add the agency business system in the <Agency> Current-State Business Systems worksheet. The agency business system will appear next business day.
13. Select the related Florida PALM interfaces that will be used with the activity in the *Related Florida PALM Interfaces* column. Select N/A if the activity does not use Florida PALM interfaces.
 - a. If an interface is missing, add the missing interface in the <Agency> Implementation Interfaces and Documentation worksheet. Interfaces will appear next business day.
14. Provide a summary of the technology changes that will need to occur in the *Describe the Technology Change* column for the activity.
 - a. Technology refers to the applications or tools used to process, track, or report on financial operations
 - i. Will it be a business system that is impacted? Then note the impact for Technology.
 - ii. Examples include interfacing business systems (Tier 1) or business systems that support the business processes without interfacing directly (Tier 2 or greater).

Combined Change Analysis View Report

The <Agency> *Combined Change Analysis View Report* pulls together all <Agency> *Change Analysis - <BPG> Processes* worksheets into a single report for a consolidated view. This report is view only. Any needed updates must be made in the related <Agency> *Change Analysis - <BPG> Processes* worksheet.

Complete Data Mapping Analysis Worksheet (Optional)

A Data Mapping Analysis worksheet has been created and added to your <Agency> *Florida PALM Workbook, Change Analysis* folder. This worksheet contains all the data elements from your <Agency> *Current-State FLAIR Data Elements* worksheet (RW Task 324) with a selection of "Yes", "Undetermined", or left blank in the *Continued Use* column. The <Agency> *Data Mapping Analysis* worksheet is optional but is highly encouraged so that your agency can later test and validate the critical data sources needed for agency reporting is available in Florida PALM.

NOTE: Your <Agency> Current-State FLAIR Data Elements worksheet has been locked from editing. If you need to update information about the usage of FLAIR Data Elements within your agency, you may update in the new <Agency> Data Mapping Analysis worksheet.

<Agency> Data Mapping Analysis (Optional) Worksheet Field Details

Agencies may choose to provide the following items within each <Agency> Data Mapping Analysis worksheet.

Table 2 : Data Mapping Analysis

Field Name	Field Description	Required/Optional Field	Source of Data
FLAIR Data Element	Prepopulated list of most common FLAIR data elements used for capturing information on transactions.	Required – Project Provided	<Agency> Current-State FLAIR Data Elements worksheet with Data Elements with “Yes”, “Undetermined” selections or left blank in the <i>Continued Use</i> column.
Purpose	The use of the data element within the agency.	Required – Project Provided	<Agency> Current-State FLAIR Data Elements worksheet with Data Elements with “Yes” or “Undetermined” selections or left blank in the <i>Continued Use</i> column.
Source	How the data element is determined or derived.	Required – Project Provided	<Agency> Current-State FLAIR Data Elements worksheet with Data Elements with “Yes” or “Undetermined” selections or left blank in the <i>Continued Use</i> column.
Data Usage	Outputs prepared by the agency that use the data element.	Required – Project Provided	<Agency> Current-State FLAIR Data Elements worksheet with Data Elements with “Yes” or “Undetermined” selections or left blank in the <i>Continued Use</i> column.
Agency Business Systems: Name	List of Agency business systems from your <Agency> Agency Business System Inventory.	Required – Project Provided	<p><Agency> Current-State FLAIR Data Elements worksheet with Data Elements with “Yes” or “Undetermined” selections or left blank in the <i>Continued Use</i> column.</p> <p>The drop-down options available for this column are derived from the <Agency> Current-State Business Systems worksheet.</p> <p>If an agency business system is missing, add the correction in the <Agency> Current-State</p>

Field Name	Field Description	Required/ Optional Field	Source of Data
			<i>Business Systems</i> worksheet. Updates will appear next business day.
Agency Business Systems: Details of Use	How the agency business system will use the data element.	Required – Project Provided	<Agency> <i>Current-State FLAIR Data Elements</i> worksheet with Data Elements with “Yes” or “Undetermined” selections or left blank in the <i>Continued Use</i> column.
Current State Comments	Agency comments.	Required – Project Provided	<Agency> <i>Current-State FLAIR Data Elements</i> worksheet with Data Elements with “Yes” or “Undetermined” selections or left blank in the <i>Continued Use</i> column.
Florida PALM Data Element	Identify how the data element is being mapped to Florida PALM.	Required – Agency Provided	N/A
Florida PALM Data Element Source	Indicate the source of the Florida PALM data element. Drop down options include: <ul style="list-style-type: none"> • Conversion Mapping • Interface Layout • COA • Agency Configuration Workbook 	Required – Agency Indicated	N/A
Florida PALM Mapping Details or Comments	Provide more details about the selected Florida PALM data element source or include additional comments, as necessary.	Required – Agency Provided	N/A

<Agency> Data Mapping Analysis (Optional) Worksheet Instructions

The information below provides detailed column instructions on how to complete the <Agency> *Data Mapping Analysis (Optional)* worksheet in Smartsheet.

Review and Update Current State

1. Review all provided information populated directly from your <Agency> *Current-State FLAIR Data Elements* worksheet. Make necessary updates to the following columns:
 - a. FLAIR Data Element – This column is prepopulated with any FLAIR Data Elements identified in RW Task 324 with a selection of “Yes”, “Undetermined” or left blank in the *Continued Use* column.

- i. You may add rows to include additional FLAIR Data Elements if necessary.
- b. Purpose – Describe the use of the data element within your agency.
 - i. Only one purpose for each data element row.
 - ii. If there is a different purpose for the data element within your agency (e.g., different usages by systems, divisions or units within the agency), you may add a new row and indicate with the purpose field how it is used differently.
- c. Source – Describe how the data element is determined or derived, including for titling (when made a valid FLAIR value) and for inclusion on a transaction (when keyed in a transaction).
- d. Data Usage – Identify the outputs (i.e., reports, extracts) prepared by your agency that use the data element for the identified purpose.
- e. Agency Business Systems: Name – Select the agency business system(s) that uses the FLAIR data element
 - i. The drop-down options are populated from your <Agency> *Current-State Agency Business System Inventory*.
- f. Agency Business System: Details of use – Describe how the agency business system uses the data element.
- g. Current State Comments – Provide any additional notes or contemporaneous information that supports the responses to the prior columns.

Map the Current State to the Future State

2. Identify which Florida PALM Data Element your agency is mapping the FLAIR data element to in the *Florida PALM Data Element* column.
3. Select the Florida PALM data element source(s) from the drop-down list in the *Florida PALM Data Element Source* column.
 - a. Drop down options include:
 - i. Conversion Mapping
 - ii. Interface Layout
 - iii. COA
 - iv. Agency Configuration Workbook
 - b. You may also add other values as well.
4. Use the *Florida PALM Mapping Comments* column to provide any additional information on the data element such as indicating the specific Interface Layout or Configuration worksheet the data element is found in.

How will agencies use this information?

Agencies will use the information documented in the Change Analysis Tool to identify all activities that must be tested and validated during User Acceptance Testing and topics for training delivery for agency end users.

What will the Florida PALM Team do with this information?

The Florida PALM team will review the information provided to gain insight into your agency's level of needed preparation for Florida PALM, as well as identify trends across agencies.

The Project team will also review your task submission based on the following criteria to confirm completion.

Table 3: Task Completion Rubric

Task Completion Rubric
No cells are yellow in the <Agency> Change Analysis - <BPG> Processes worksheet, indicating all required fields contain valid values.
Task Tracker has been marked as 100% complete.

Task Instructions

Collaborate with your Change Champion Network to provide all required information for Change Analysis.

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Change Analysis

As you are working, track progress in your RW Task Tracker. Indicate task completion by updating the RW Task Tracker to 100% only when you have completed the rubric included in Table 3 above.

Table 4: Summary of Task Completion Steps

Summary of Task Completion Steps
1) Collaborate with your Change Champion Network to review the Florida PALM Topics and Activities list and then complete the individual Change Analysis worksheets.
2) Complete the Data Mapping Analysis worksheet if necessary.
3) Track and record task progress in the RW Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator and Technical Readiness Team.
4) Complete task by January 31, 2025 .
5) When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.
6) If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.

Supporting Materials & Resources:

- [Florida PALM Topics and Activities list](#)